
Program Memorandum Intermediaries/Carriers

Department of Health and
Human Services (DHHS)
Centers for Medicare & Medicaid
Services (CMS)

Transmittal AB-01-107

Date: AUGUST 2, 2001

CHANGE REQUEST 1726

SUBJECT: Customer Service Plans (CSP) Reporting Procedures

As required in the memo dated December 12, 2000, it is critical that contractors continue to report their beneficiary outreach and education activities. This Program Memorandum (PM) advises carriers and fiscal intermediaries of the CSP reporting guidelines. Contractors will find instructions regarding the frequency, content, and format of the reports.

Completed Activities

- Contractors should submit their CSP reports to their corresponding regional offices (ROs) quarterly. The reports should be sent (mailed or e-mailed) within 30 days of the close of the quarter to the designated Associate Regional Administrators (ARA) for Beneficiary Services and the Consortia Contractor Management Officer. First and second quarter CSP reports should be submitted no later than 30 days from the implementation date of this PM, and combined reports for the first two quarters are acceptable.
- The reports should include a summary of the outreach and education activities conducted during the quarter. The format outlined in the December 22, 2000 memo to the contractors should be followed. At a minimum, the CSP quarterly reports should include the event name and location, number of participants (expected /actual), name of partner organization(s), type of event, date of the event, and total cost. These events should relate to the areas described in the Budget and Performance Requirements (BPRs) under Activity Code 13004.
- Contractors should plan funds and resources according to the targeted amount approved for CSP activities in FY 2001.

Pending Activities

- Specific location and contact information will also be requested for the major events in which contractors will be participating in the rest of the fiscal year. This information will be solicited via e-mail notifications and uploaded to the event calendar on medicare.gov. This process will replace online reporting of events to the Local Medicare Events Editor/Outreach Calendar Database. Contact the RO REACH Campaign contact for additional information regarding this revised method of reporting within 30 days of the implementation date of this PM.

Requested Activities

- In order to document lost events due to outreach budget limitations, contractors should submit information to the RO about activities/events that they are unable to perform. The activities will be compiled by the RO on a spreadsheet called the Lost Events Tracker, which will then be submitted to central office (CO) for review.
- Additionally, contractors may submit the Lost Events Tracker spreadsheet with their CSP quarterly reports in substitution for the listing of activities which they do not anticipate supporting. Contractors should support this process in order to facilitate a complete and accurate assessment of the customer service requests that cannot be fulfilled. Further guidelines will be provided by the REACH RO contacts.

- Electronic submission of data is preferred. Contact the RO within 30 days of the implementation date of this PM, and provide your e-mail address in order to obtain the spreadsheet in electronic format. The RO can provide you with information on an alternative method of submission if electronic transmission is not possible. The RO contacts are listed below.

Regional Office Contacts:

<u>Region</u>	<u>Name</u>	<u>Telephone</u>
Boston	Jeanette Clinkenbeard	(617) 565-1250
New York	Renee Cutalia	(212) 264-3671
Philadelphia	Denise DeLeon	(215) 861-4226
Atlanta	Alice Farmer	(404) 562-7225
Chicago	Rita Wilson	(312) 886-5213
Dallas	Susan McLaughlin	(214) 767-6487
Kansas City	Sue Lovett	(816) 426-6317
Denver	Gloria Baca	(303) 844-6217
San Francisco	Neil Merino	(415) 744-3652
Seattle	Denise Fackler	(206) 615-2396

The *effective date* for this PM is October 1, 2000.

The *implementation date* for this PM is September 17, 2001.

These instructions should be implemented within your current operating budget.

This PM may be discarded after June 1, 2002.

If you have any questions, contact Rachael Lancelotta in CO at 410-786-7424 or your RO Associate Regional Administrator for Beneficiary Services.

Attachment

ATTACHMENT

Outreach Event Reporting Process for 2001

Instructions for Posting Activities to the medicare.gov Outreach Calendar

Reporting Medicare outreach events has been an evolving process. Based on comments and concerns reported to CMS by our partners concerning reporting events on the Local Medicare Events Editor (Outreach Calendar Database), a new process for event reporting has been developed. The new process was designed to reduce reporting burdens by requiring less information to be reported, and by utilizing different technology to facilitate reporting with greater ease.

How

Event reporting no longer has to be completed online. Event reports can now be completed and submitted electronically via e-mail or faxed on a simple one-page form. The form contains half the fields as last year's Local Medicare Events Editor. The REACH event contractor (JBS) will issue bi-weekly e-mails requesting event data. If you have a new event to report, reply to the e-mail with the requested details. Bi-weekly e-mails will contain a calendar of events already posted to the website to reduce duplicative efforts. To have your address placed on the mailing list, e-mail your name, e-mail address, phone number, organizational affiliation, and the name of the CMS region that you are located in to reach@jbs1.com.

What

Only major events should be reported. Major events are defined as:

- The BIGGEST events that you will be participating in a given month;
- Events that draw attendees from across the State (as opposed to one part of the state);
- Events that involve a statewide coalition of partners; and
- Events that are taking a unique approach to outreach

The definition of major events is relative to the organization and to the month. It is suggested that Medicare partners receiving this letter post 3-5 of their major activities each month.

Why

The purpose of posting events to the Medicare Events calendar is to inform the public of events in their area. Postings to the calendar are not intended to capture all activities by an organization, and data from the calendar will not be used to quantify the number of events an organization has participated in.

When

Events should be prospectively reported, at least one month in advance whenever possible.

Who to Contact

To have your address removed from the mailing list, please e-mail your name and contact information to reach@jbs1.com.

If there is an error in posted event information, there needs to be a change in posted information, or if there are any other questions about the information posted to the website, contact JBS at (301) 495-3016. If there are technical problems with the way event information is being displayed on the website, contact Fu at 1-800-883-3836. Contact your RO event reporting coordinator with other questions regarding event reporting.

Regional Office Contacts:

<u>Region</u>	<u>Name</u>	<u>Email (@cms.hhs.gov)</u>	<u>Telephone</u>
Boston	Peter MacKenzie	pmackenzie	(617) 565-1185
New York	Marcia Pryce	mpryce	(212) 264-3678
Philadelphia	Pam Bragg	pbragg	(215) 861-4303
Atlanta	Alice Farmer	afarmer	(404) 562-7225
Chicago	Rita Wilson	rwilson2	(312) 353-2771
Dallas	Susan McLaughlin	smclaughlin1	(214) 767-6487
Kansas City	Sue Lovett	slovett	(816) 426-6317
Denver	Gloria Baca	gbaca	(303) 844-6217
San Francisco	Neil Merino	nmerino	(415) 744-3652
Seattle	Shawn Hanson	shanson	(206) 615-2579

We have worked hard to streamline the event reporting process this year and reduce reporting burden. We continue to appreciate your efforts to help us publicize Medicare events through www.medicare.gov.